

freshwater aquaculture make in-roads into the Canadian market share or if protectionist pressures in the U.S. are brought to bear on the Canadian industry.

Both the Ontario industry and the FFMC concentrate on the U.S. market, supporting the FFMC's contention that sales in the U.S. provide better returns. However, neither the FFMC nor the processors of the Ontario Region have sought to develop the local markets so as to compensate for present lower domestic returns with higher sales volumes and lower transportation costs. This does not mean that the local market would not be lucrative if developed. For the development of the intra-provincial markets of the Western Region, the Committee recommends that:

- (15) The FFMC and the provincial/territorial governments jointly pursue concerted efforts to stimulate the expansion of the domestic market for freshwater fish.**

The Committee considers that the recent changes in the Alberta and Saskatchewan fish marketing regulations are unlikely to disrupt the FFMC's current intra-provincial sales but may increase freshwater fish and particularly fresh fish consumption at the local level.

It should be noted that in those areas (Alberta, Saskatchewan) where the fishermen are allowed more latitude to sell their fish intra-provincially, the purchasers such as processors, wholesalers and distributors must obtain from the FFMC a special dealer licence. Additionally, they must satisfy various provincial licensing requirements related to public health regulations. The Committee recommends that:

- (16) The licensing process for intra-provincial sales be streamlined by eliminating the requirement for special dealer licences in all provinces under FFMC jurisdiction.**

This will have the effect of putting the licensing process entirely in the hands of the provincial/territorial governments. As a further means of developing the domestic market, the Committee recommends that:

- (17) The FFMC continue to extend efforts to ensure the expansion of distribution and sales of freshwater fish in the Western Region as well as in Central Canada.**

The above recommendation implies the use of improved packaging for fish offered on local markets. This should be similar to the excellent packaging, superior to that of most competitors, which the FFMC already uses for the U.S. market.

The Committee recognizes that the FFMC, in cooperation with other agencies (e.g. The Freshwater Institute), has had some good success in developing products such as golden caviar, pickerel cheeks, etc. It therefore strongly encourages the FFMC to promote these products on the domestic market.

Increased consumption of fish in Canada is intrinsically linked to the promotion of fresh fish sales in the large retail food chains and specialty fish shops. At present, these concentrate on selling frozen fillets and frozen whole fish in dump coolers. Such displays can hardly compete with those of fresh red meats, poultry and pork.

In U.S. supermarkets, fresh fish counters with large, open-faced display coolers are prevalent. There are usually attendants to serve customers, just as there are butchers in